



BAY AREA  
AIR QUALITY  
MANAGEMENT  
DISTRICT

January 14, 2010

Request for Information No. 2010-003

**REQUEST FOR INFORMATION FOR  
COMMERCIAL REAL ESTATE BROKERAGE AND  
ADVISORY SERVICES**

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**SECTION I – SUMMARY**

This Request for Information (RFI) is issued to solicit information and concepts from real estate brokers, consultants, and other interested parties capable of, and interested in, assisting the Bay Area Air Quality Management District (Air District) in exploring the relocation of its offices. Central to this effort is a desire to find a “greener,” more energy-efficient building that is better suited to the current needs of the agency and one that is located on or near a transportation hub. The Air District would also like to explore the possibility of co-locating with other regional agencies.

The Air District currently employs approximately 350 full time employees, about 200 of whom work in the Air District headquarters office at 939 Ellis Street in San Francisco. The Air District owns this 116,000 SF building unencumbered by any outstanding debt. Other Air District employees, primarily air quality inspectors and staff who conduct air quality testing and monitoring, work out of small leased office spaces elsewhere within the nine-county Bay Area. One potential solution for the agency is to lease or purchase an existing or new headquarters building in San Francisco or Oakland.

Another possible solution is co-location with two other regional agencies, the Metropolitan Transportation Commission (MTC) and the Association of Bay Area Governments (ABAG). MTC currently employs 200 employees and ABAG currently employs 77 employees. The two agencies are partial owners, through a condominium ownership structure, of a 120,000 SF building at 101 Eighth Street in Oakland. There is no outstanding real estate debt on the property. Within this building, MTC occupies approximately 50,000 SF of space and ABAG occupies approximately 17,000 SF of space. The Air District, MTC and ABAG particularly wish to explore possible sites in San Francisco and Oakland, including the possibility of locating in the new Transbay Terminal building.

This RFI is being sent to a short list of licensed commercial real estate brokerage firms. Other firms are invited to respond. To respond to the RFI, an interested company should submit four (4) hard copies and an electronic copy of its response (in Microsoft Word or Adobe Acrobat format) via email to:

Mary Ann Okpalaugo, Strategic Facilities Planning Manager  
Bay Area Air Quality Management District  
939 Ellis Street San Francisco, CA 94109  
mokpalaugo@baaqmd.gov

**Please submit your response no later than 4:30 PM on February 5, 2010.**

Responses should address all information requested in this RFI. Minority business enterprises, women's business enterprises, and Certified Green Businesses are encouraged to submit proposals. **Any technical questions regarding this RFI should be directed to Mary Ann Okpalaugo at voice: (415) 749-5127 or email: mokpalaugo@baaqmd.gov.**

This RFI is an invitation to respond only and is not an offer or agreement to hire or to provide services. It shall not in any manner be construed to be an obligation on the Air District's part to enter into a contract or result in any claim for reimbursement for costs or efforts expended in responding to this request including preparation, submission, and/or presentation of proposal(s). The Air District will not be bound by any proposal received, and reserves the right to reject any or all proposals. Submissions shall become property of the Air District without obligation and subject to public inspection.

## **SECTION II – TYPES OF SERVICES NEEDED**

The Air District, MTC, and ABAG may ultimately need a variety of services in analyzing options for office relocation, lease or sale of currently-owned real estate, and lease or purchase of new facilities. Assistance may be needed in the following areas but are not limited to:

- A. Programming: Participation on consulting team in evaluating Air District, MTC, and ABAG's current staff and potential future growth trends to determine the appropriate size and location of new premises.
- B. Market Studies: Market studies/strategies of the relevant urban SF and Oakland markets and implementation of comprehensive marketing plans, on behalf of the Air District, MTC, and ABAG with market trends; leasing/sales analysis.
- C. Capital Market Advisory: Due diligence on the financial position and solvency of any prospective developer, landlord or property manager, including but not limited to the current debt loads.
- D. Real Estate Acquisition and Development: Assistance to the Air District, MTC, and ABAG with acquisition, joint venture opportunities, built-to-suit, or equity ownership interest of developed or undeveloped commercial property, including identification of available properties, negotiation with owners and development of

transaction documents in coordination with the Air District, MTC and ABAG's legal counsel or other representatives.

- E. Other Real Estate Associated Service: Other real estate services, including but not limited to, project management, finance analysis, and tax incentive analysis.

### **SECTION III – RESPONDING TO THIS RFI**

To respond to this RFI, please provide the background information requested in section III.A below and answer the questions in the questionnaire in section III.B below.

#### **A. Background Information on the Firm**

1. Provide a general background of the firm including the scope of services available, number of years in business, the firm's core business or specialization, tenant representation, land lord representation, property management etc. and any other information pertinent to the general background of the firm and current financial position regarding income, debt, and growth of the firm. Include percentage of each scope of services as a total of overall business services.
2. Provide an organization chart outlining the roles and responsibilities of the Project Team members (those who will be involved and accessible on a daily basis) and how each member will play a role in overall strategy/service delivery. Does your company have the ability to provide project management, demographic analysis, strategic and financial planning advisory services? Please describe the individuals who will be providing those services, whether such a service is their primary function and whether or not they are in house.
3. Provide a list of three (3) references that the Air District, MTC, and ABAG or its representative may contact. For each reference, please provide: (i) name of organization. (ii) name of the contact person at the organization. (iii) phone number for the contact person, (iv) email address or the contact person, and (v) nature of relationship
4. Describe how your firm is normally compensated for services provided. Include, if applicable, proposed commission rates, discounts, and any non-broker professional personnel that may be separately compensated for services provided by the firm.
5. For real estate brokerage firms, list any and all buildings your firm is currently representing (and indicate the building owners). Specifically, note any buildings which may accommodate a tenant of 100,000 SF or greater. In addition please list any other buildings which are owned or partially owned by an organization with whom you currently hold other listing agreements.

**B. Questionnaire**

1. What are the most common errors you see good brokers make when handling assignments, and how does your firm avoid making these common errors?
2. Describe your view of the San Francisco/Oakland real estate market, current market conditions, and least understood nuances that will impact your approach and strategy for this project.
3. Provide three (3) examples of how the lead professional(s) and your firm have added value on similar assignments in ways that you don't think others could match.
4. How would your firm integrate/coordinate various services and disciplines to provide a comprehensive, full service approach to the Air District, MTC, and ABAG's requirements?
5. Provide a brief overview of the process you would follow and the anticipated schedule.
6. If applicable, list the firm's most significant real estate transactions (i.e., greater than 200,000 SF) completed within the last 24 months. Please indicate whether your firm was involved on the tenant or landlord side and highlight those transactions on which the project team members were involved. Further, please describe specific examples of creative real estate solutions you have completed for such tenants during the last 36 months.
7. Describe the firm's experience with sustainability issues, whether anyone in your firm has received LEED certification, and how this may apply to our real estate options.
8. Describe examples of how your firm has creatively handled increased construction costs associated with build outs or relocations.
9. Describe what experience your firm has in managing core & shell construction and/or tenant improvements for tenants of 100,000 SF or greater in the last 36 months
10. If applicable, list all current sales transactions that the proposed team has closed in the last 12 months within the City and County of San Francisco and Oakland.

All RFI Proposals meeting the submission requirements will be evaluated by a review committee. The names of the review committee members will not be revealed (other than the names(s) of any interviewers, if any). Individual or composite ratings by the review committee members will not be revealed and are confidential. Members of the review committee will review the written responses to determine which firms (if any) will be invited for an interview or if an interview phase will occur. Should interviews occur, they will take place at the Air District's offices. Principal team members identified in your proposal should participate in the interview.